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U.S. IMPORTS FROM JAPAN: A REVIEW OF 1984 SALES

Summary

Vigorous domestic economic growth and the high-flying dollar blew the lid off imports from Japan in 1984, pulling purchases up 38.7 percent to $57.1 billion. Capital goods expanded by a once-unimaginable 62.2 percent to $19.3 billion, but this end-use category represented just the cutting edge of imports made in Japan. Purchases of automotive products picked up some more steam, increasing 23.9 percent to $18.5 billion. So did imports of consumer goods, which climbed 35.8 percent to $11.3 billion. Moreover, shipments of intermediate goods reversed course, advancing 35 percent to $7.3 billion.

Import Profiles

Capital Goods - The competitive pressures of the American market in the mid-1980s have forced U.S. manufacturers to spend heavily on new plant and equipment to improve efficiency. This prod has turned business investment into a driving force in the current recovery, with capital spending kicking in almost a third of the economy's 1984 expansion. But to the dismay of domestic producers of capital goods, their foreign rivals, aided by the mighty dollar, siphoned off perhaps as much as two-fifths of the jump in equipment purchases. More often than not, these overseas suppliers were Japanese companies.

According to some rough calculations, purchases of high technology products accounted for approximately half of all U.S. equipment spending last

year. This investment pattern was tailor-made for Japanese companies, which parlayed their prowess in product and manufacturing technologies as well as the competitive edge the strong dollar gave them into huge sales gains. Take computers for example. Purchases of Japanese-made data processing equipment and parts climbed 78.9 percent to $3.2 billion after more than doubling in 1983. Once again, indirect evidence suggests, imports were fueled by peripherals for personal computers. Explosive U.S. sales of personal computers, especially business-oriented systems, played straight into the hands of Japanese makers of printers since they dominate the American market for low-end dot matrix and daisywheel printers -- and this market at least doubled in volume last year. Because disk drives for personal computers are also the type of high-volume commodity product in which Japanese suppliers excel, the boom in sales of desktop systems enabled Japanese companies to expand their already significant inroads in the market for 5.25-inch floppy disk drives and capture a bigger slice of the smaller market for 5.25-inch rigid drives. Increased shipments of terminals apparently swelled the import total as well, although Japanese manufacturers have not made the same headway in this category of peripherals as they have in printers and disk drives.

To the continued surprise of many U.S. industry watchers, the success of Japanese companies in the market for personal computer peripheral products again failed to carry over to the systems themselves. Shipments did increase as makers made a last-ditch effort to break into the American market by climbing on the IBM PC bandwagon, but this gain was possibly even less of a factor in the import surge than expanded arrivals of Japanese-made portable or knee-top computers. It definitely took a back seat to the jump in parts deliveries. Ranging all the way from individual components up to mainframe subassemblies, these parts, like many of the systems and peripherals coming in from Japan, were bought mainly by American computer makers shopping for cost-competitive sources of supply.

Deregulation and the breakup of the Bell System have made telephone equipment another major growth industry, but these same developments have also triggered a bruising battle for sales in both the commercial and residential ends of the business. With new domestic and foreign competitors still flocking into the market and established suppliers, including the leading Japanese makers of telephone equipment, continuing to jockey for position, a glut of private branch exchanges, key telephone systems and single-line telephones has developed. This inventory overhang has exacerbated the industry's long-running price wars, driving prices down to break-even levels or less. Despite repeated predictions of a shakeout among companies offering customer-premises equipment, the industry free-for-all has yet to deter Japanese manufacturers and the numerous U.S. vendors marketing Japanese-made equipment. In 1984 alone, imports of telephone equipment and parts from Japan climbed 114.3 percent to over $0.7 billion.

With sales of personal computers booming and other big semiconductor end-user industries -- mainframes, minicomputers, telecommunications equipment, industrial and consumer electronics products and military hardware -- chalking up solid shipment gains in 1984, demand for most types of memory and logic chips continued to build through the year's first half. Lead times, which had

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started to stretch in the spring of 1983, became longer, even though U.S. merchant semiconductor manufacturers placed more capacity in operation, and prices, particularly quotes on high-volume memories, firmed. These market conditions were a bonanza for merchant producers, yet the industry found little to celebrate in its 1984 sales record. For starters, semiconductor imports from Japan were up 116.2 percent to $1.8 billion-plus. Moreover, Japanese suppliers added several percentage points to their U.S. market share, mainly because of their continued edge in 64K dynamic random access memories (RAMs), the industry's biggest-selling chip, and their early lead in 256K memories. Equally worrisome to American makers was a sudden softening of demand in 1984's second half. This weakness, which primarily reflected a huge inventory buildup by overly optimistic manufacturers of personal computers, quickly dropped orders well below shipments -- the traditional signal of hard times ahead for the industry. To make matters worse, large amounts of new capacity were still coming onstream in both the United States and Japan, setting the stage for another round of deep price cutting, particularly in RAMs and other high-volume products.

With a big boost from the economy, 1984 turned into another record shipment year for both American-made copiers and models imported from Japan, which advanced 27.3 percent to $0.9 billion. Like semiconductor makers, though, Xerox Corp. and the handful of other U.S. manufacturers of copiers continued to lose market share to their Japanese competitors. Part of this erosion reflected hot sales of personal copiers -- a market Canon Inc. single-handedly created two years ago. But most of it took place in the industry's traditional low end (tabletop machines making 30 copies a minute or less), where Japanese vendors kept Xerox on the defensive by adding more convenience features to their products and pricing aggressively. The story was entirely different in mid-volume copiers. Armed with an expanding new family of sophisticated, competitively priced copiers targeted mainly at this market segment, Xerox held its ground against a fast-increasing lineup of high-performance machines from Japanese producers.

Struggling U.S. machine tool builders should have been major beneficiaries of 1984's surge in capital spending because most of this money was earmarked for plant modernization. Big outlays by automotive manufacturers and defense contractors did breathe some much-needed life into domestic machine tool orders, but bookings still fell far short of most projections. The continued slump in a number of important end-user industries was one cause of this shortfall. Equally important, American durable goods makers bought more Japanese-made equipment, which lifted imports 71.6 percent to just under $0.8 billion. For some products like small and medium-sized numerically controlled lathes and machining centers, buyers had little choice since many leading U.S. machine tool builders have conceded these commodity market segments entirely to their Japanese rivals as part of a massive restructuring drive.

Automotive Products - Any lingering doubts that the U.S. car market was back on track after its 1980-82 battering were quickly laid to rest in 1984. Helped by the second year of strong economic recovery, stable gasoline prices and improved consumer confidence, American auto makers rang up sales of 7,951,517 units, a 17 percent advance on 1983's total and the industry's best performance since 1979. For Japanese motor vehicle exporters, however, strengthening market conditions proved to a source of both frustration and

relief. With the ceiling on U.S.-bound car shipments up 10.1 percent for the April 1984-March 1985 period to 1,850,000 sedans plus roughly 90,800 station wagons and four-wheel-drive vehicles and 77,000 cars for Puerto Rico, imports of Japanese-built cars increased 8.9 percent to 1,950,406 units. Yet in a development that passed virtually unnoticed amid the renewed debate on the future of the restraint arrangement, sales of Japanese nameplates slipped 0.5 percent in 1984 to 1,906,208 units and their market share dropped to a five-year low of 18.3 percent.

The cause of the sales dip was not hard to identify since it was Japanese makers' old nemesis, inadequate inventories. Total stocks of Japanese cars never got higher in 1984 than January's skimpy level of a 24-day supply, and a 20-day supply became the new definition of the inventory norm for Japanese makes. Actually, import leader Toyota Motor Corp. would have been happy if its U.S. distributors and dealers had had this much stock since inventories roughly half this size turned 1984 into a year of flat sales. Lean inventories also meant a no-growth year for Subaru of America Inc., which is supplied by Fuji Heavy Industries, Ltd. Nissan Motor Co., Ltd., the number-two import seller, and Mazda Motor Corp., however, could not even match their 1983 totals. In fact, Honda Motor Co., Ltd., alone among the five top Japanese suppliers, managed to post a sales gain, although it was also the only company to report lower sales in 1983.

Whether sales were up or not in 1984, Japanese car makers and their distributors and dealers made more money. How much is anyone's guess since none of the companies breaks out profits on its American operations. Another hike in the average U.S. selling price of Japanese makes -- estimated at $1,300 by the U.S. International Trade Commission, which pegged the 1983 jump at $831 -- offers one hint, however. The increasing tilt of Japanese product mixes toward option-loaded economy cars and luxury models provides another. Between 1982 and last year, for example, Toyota's sales of its high-end Celica, Supra, Camry and Cressida models expanded from 35.3 percent of its total retail deliveries to 43.6 percent, while Nissan's sales of the top-of-the-line Maxima, 200SX and 300ZX went from 34 percent to 42.2 percent. U.S. import data also provide a clue to how much more money Japanese car manufacturers earned in the United States in 1984 since purchases were up 20 percent to almost $12.4 billion on a shipment gain of less than half that size.

With car shipments limited, Japanese automotive makers have counted on small trucks to take up the slack in their U.S. motor vehicle sales. This plan has succeeded: sales of the five Japanese compact truck nameplates have jumped in each of the last three years. But boosting sales has been an uphill battle since General Motors Corp., Ford Motor Co. and Chrysler Corp. jumped into the small truck market in late 1981-early 1982 with the first domestically designed and manufactured compact pickups. Japanese builders in fact lost market share in both 1982 and 1983 before fighting Detroit to a standstill last year with some familiar marketing tactics. Aggressive pricing remained the key, as importers kept stickers on their price-leader trucks below $6,000 for the third consecutive year. They also continued to add new models to their lineups, expand advertising budgets and periodically offer below-market financing and other incentives.

These strategies paid handsome dividends in 1984's extremely robust U.S. truck market. Each of the five Japanese makes set sales records and combined

retail deliveries soared 54.7 percent to 650,026 units (including 95,162 assembled by Nissan in Tennessee), nudging Japan's share of the American small truck market up to 37.7 percent from 37 percent in 1983. To support this sales jump, distributors worked down the generally large inventories they had carried in 1984. Imports were also increased 34.8 percent to 566,283 units, which lifted purchases 36.9 percent to just under $2.4 billion.

Consumer Goods - With consumer spending propelling the U.S. economy out of recession in 1983, sales of consumer electronics products took off. As good as that business was, it paled in comparison with shipments last year. Another big jump in purchases of durables in 1984 lifted sales of color televisions, projection TVs, home radios, portable cassette players, tape recorders and combination units to new highs. Even sales of audio components and systems, the market's most lackluster segment in recent years, broke records. Once again, though, the hottest action was in video cassette recorders (VCRs).

Plummeting prices continued to whet VCR demand, particularly in the market's big low end, where discount prices on established brands broke through the $300 barrier. New technology that makes VCRs easier to operate, more versatile and smaller also promoted the popularity of these machines. So did the spread of neighborhood video stores with their fast-expanding libraries of prerecorded programming. Against the backdrop of the consumer spending spree, these developments boosted VCR sales from some 4.1 million units in 1983 to an estimated 7.6 million units last year -- a jump paralleling imports from Japan, which topped 9.3 million units valued at $2.8 billion-plus.

Intermediate Goods - Regardless of the state of the U.S. steel market, imports of steel mill products from Japan had nowhere to go but up in 1984 after tumbling the year before to their lowest point since 1965. As it developed, market conditions continued to improve from 1982's depressed level. Demand was not as robust as the strong showing of business investment and consumer spending would have indicated, but the pickup did provide additional relief to hard-pressed American steel makers. It also pulled in more Japanese steel, which rebounded 56.5 percent in volume to 6.6 million tons and 48.8 percent in value to nearly $3.2 billion.

Higher output in the U.S. automotive industry -- steel's single largest customer -- and near-record production of appliances jacked up demand for cold-rolled, hot-rolled and coated sheets, whether produced here or in Japan. Booming construction activity also led to increased shipments of flat-rolled products, both directly and through expanded demand for building products. In addition, stepped-up construction lifted demand for domestic and imported structural shapes and wire rods. What really made the difference in the state of the U.S. steel market, however, was the upturn in oil and gas exploration and development work. This recovery turned around shipments of oil-country tubular products and large diameter line pipe from American and Japanese mills alike after a two-year slide.

Import Prospects

Although U.S. economic growth this year is certain to fall far short of 1984's strong performance, the slowdown will shave few if any points off the expansion rate of Japanese imports. A big increase is in store for automotive

products since no matter what happens to truck shipments, the hike in the ceiling on Japan's U.S.-bound car exports for FY 1985 will automatically translate into large import gains. Purchases of consumer goods will also be up again by a sizable margin in response to the continued buoyancy of consumer spending. So, too, will capital goods, although scaled-back corporate investment plans for 1985 point to some moderation. In fact, the only end-use category in which there might be a noticeable dropoff in import growth is intermediate goods -- a prospect that reflects the new limits on Japanese steel shipments.

For further information, contact Susan MacKnight.

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The views expressed in this report are those of the author and do not necessarily reflect those of the Japan Economic Institute.

U.S. Imports from Japan by Commodity, 1983 and 1984

(in millions of dollars* and indicated quantity units)

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Total Imports			$41,183.2	$57,135.0	38.7%	17.5%
Capital Goods			11,895.8	19,289.6	62.2	32.3
Nonelectric Machinery			7,906.8	12,891.9	63.0	35.1
Business Machines			3,789.3	6,414.6	69.3	46.4
Office Typewriters	410,450 no	632,040 no	105.8	166.3	57.2	59.6
Calculators	16,925,952 no	21,357,889 no	196.0	276.3	41.0	70.8
Cash Registers (excl. point-of-sale units)	299,936 no	396,024 no	82.6	97.0	17.4	98.3
Photocopiers and Parts			713.4	907.9	27.3	81.1
Photocopiers	542,812 no	762,703 no	575.1	723.3	25.8	79.7
Parts			138.3	184.6	33.5	87.2
Data Processing Equipment and Parts			1,780.7	3,185.4	78.9	41.4
Data Processing Equipment			1,062.8	1,873.4	76.3	53.7
Parts			717.8	1,312.1	82.8	31.3
Machine Tools and Parts			452.2	776.2	71.6	46.5
Electric Discharge Machines	548 no	841 no	21.4	38.3	79.0	63.7
Numerically Controlled Lathes	1,568 no	2,889 no	101.1	173.8	71.9	87.5
Machining Centers	1,876 no	2,813 no	155.9	238.1	52.7	92.0
Punching and Shearing Machines	872 no	1,461 no	20.7	62.3	201.0	46.3
Casting Machines Used in Metallurgy and Parts			79.8	15.6	-80.5	31.8
Farm Tractors	45,960 no	60,383 no	169.6	247.3	45.8	39.9
Under 40 Horsepower	41,265 no	50,722 no	136.2	183.0	34.4	85.9
Hydraulic Excavators and Other Excavating Machinery and Parts			112.2	368.1	228.1	37.7
Front-End Loaders	1,582 no	3,314 no	60.4	148.4	145.7	44.3
Forklifts and Other Self-Propelled Work Trucks and Parts	12,616 no	28,495 no	96.2	231.3	140.4	51.2
Conveyors, Jacks and Other Materials Handling Equipment and Parts			111.7	151.1	35.3	21.8
Conveyors (except belt type)			27.6	38.1	38.0	51.4
Hydraulic Jacks	714,816 no	518,934 no	38.4	33.6	-12.5	43.7
Textile Machinery and Parts			146.2	174.7	19.5	18.3
Commercial Sewing Machines	111,023 no	139,764 no	42.8	61.7	44.2	58.6
Weaving Machines and Parts			31.0	29.0	-6.5	12.1
Pulp and Paper Mill Machinery			23.9	26.8	12.1	9.4
Printing Equipment and Parts			66.7	134.9	102.2	23.9
Sheet-Fed Offset Printing Presses	189 no	278 no	21.1	43.9	108.1	21.3
Roll-Fed Offset Printing Presses	38 no	54 no	27.7	36.5	31.8	39.1
Machinery and Parts for Making Plastics and Rubber			23.6	65.6	178.0	19.4
Injection Molding Machinery	349 no	752 no	14.2	40.6	185.9	31.0
Industrial Equipment for Treating Materials by Temperature Change and Parts			48.2	20.2	-58.1	11.1
Airconditioning Machinery and Parts			78.5	101.5	29.3	60.2
Pumps (except for motor vehicles) and Parts			41.7	52.7	26.4	10.4
Compressors and Parts			141.3	260.8	84.6	45.7
Refrigeration and Airconditioning Compressors Under 1/4 Horsepower	575,381 no	1,769,511 no	27.5	66.6	142.2	37.2
Refrigeration and Airconditioning Compressors Over 1 Horsepower	1,604,348 no	2,393,572 no	74.9	112.9	50.7	86.2

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Fans and Blowers (except for motor vehicles) and Parts			$ 38.1	$ 51.7	35.7%	8.5%
Power Hand Tools			113.6	164.3	44.6	48.0
Electric Hand Tools			57.9	101.4	75.1	54.2
Tools for Hand or Machine Use			94.5	120.0	27.0	19.2
Bearings and Parts			172.7	288.9	67.3	46.0
Radial Ball Bearings			74.9	113.8	51.9	48.2
Tapered Roller Bearings			60.6	112.3	85.3	73.4
Taps, Cocks, Valves and Similar Devices and Parts			86.0	110.4	28.4	16.5
Speed Changers and Other Transmission Equipment			34.3	45.5	32.7	18.6
Small Stationary Diesel Engines and Parts			64.8	118.5	82.9	26.4
Small Stationary Gas Engines and Parts			84.6	111.5	31.8	51.6
Steam Turbines and Parts			17.9	27.4	53.1	32.2
Electromedical Apparatus and Parts			61.9	114.1	84.3	30.6
X-Ray Apparatus and Parts			51.7	57.7	11.6	12.5
Medical, Dental and Veterinary Instruments and Parts			94.1	127.3	35.3	34.0
Optical Instruments (excl. electro-optical)			52.4	76.4	45.8	72.4
Astronomical Instruments and Parts			59.0	89.5	51.7	76.3
Microscopes and Parts			37.9	51.5	35.9	45.7
Nonelectric Measuring, Checking, Analyzing and Controlling Instruments and Parts			79.1	100.7	27.3	22.0
Electric Measuring, Checking, Analyzing and Controlling Instruments and Parts			194.9	328.0	68.3	25.2
Instruments and Apparatus for Checking or Measuring Electrical Quantities			60.9	104.8	72.1	40.5
Film Processing and Printing Equipment			81.2	77.9	-4.1	49.2
Magnetic Media			400.3	542.9	35.6	75.7
Blank Audio Cassettes	47,821,527 no	66,671,006 no	50.3	76.8	52.7	54.9
Blank Video Cassettes	38,263,139 no	61,886,607 no	200.1	267.7	33.8	87.9
Blank Magnetic Video Recording Media (excl. cassettes and cartridges)			86.6	91.3	5.4	82.9
Coin or Disc Operated Game Machines			42.0	6.3	-85.0	51.1
Electric Machinery			3,756.4	6,029.4	60.5	32.2
Semiconductors			852.6	1,843.6	116.2	24.9
Discrete Devices			172.0	318.8	85.3	24.7
Transistor Parts			102.7	206.0	100.6	34.7
Integrated Circuits			680.6	1,524.8	124.0	24.9
Linear (Analog) Chips	53,583,694 no	78,933,034 no	32.3	51.5	59.4	7.1
Digital Metal Oxide on Silicon Chips	193,750,890 no	311,431,437 no	546.0	1,282.1	134.8	35.0
Digital Bipolar Chips			72.6	130.0	79.1	8.4
Chips, Dice and Wafers			77.3	149.8	93.8	49.1
Printed Circuit Boards	13,491,012 no	10,075,647 no	57.2	78.9	37.9	30.7
Capacitors			101.1	152.1	50.4	34.9
Fixed Aluminum Electrolytic Capacitors	647,351,874 no	900,924,266 no	47.7	67.8	42.1	74.8
Fixed Ceramic Capacitors	1,262,199,284 no	1,590,846,445 no	26.1	42.8	64.0	24.5
Electronic Tubes and Parts (excl. television picture tubes)			58.1	67.0	15.3	27.8
Microphones, Loudspeakers and Amplifiers and Parts			299.1	453.1	51.5	55.3
Loudspeakers	22,382,731 no	28,874,575 no	124.8	180.3	44.5	63.6
Audiofrequency Amplifiers	2,088,982 no	2,161,254 no	101.2	140.2	38.5	70.0
Television Cameras and Parts	466,965 no	846,612 no	280.1	483.7	72.7	96.7

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Radio Transceivers (excl. citizens' band)	305,975 no	606,711 no	$ 49.9	$125.5	151.5%	59.7%
Radar and Radio Navigational Aids and Parts			48.5	50.1	3.3	26.4
Radiotelephonic Apparatus and Parts			198.4	265.6	33.9	30.5
Telephone Apparatus and Parts			340.9	730.4	114.3	47.8
Telephone Switching Equipment and Parts			145.6	319.7	119.6	57.4
Telephone Instruments	1,908,859 no	3,125,916 no	109.9	184.8	68.2	37.6
Teleprinting and Teletypewriting Machines and Parts			67.5	115.8	71.6	82.1
Telegraph Apparatus and Instruments and Parts			62.3	100.7	61.6	63.6
Switchgear			278.3	426.4	53.2	25.7
Switches			125.3	199.1	58.9	35.7
Relays			44.0	87.8	99.5	42.4
Connectors			29.4	38.6	31.3	13.6
Rectifiers and Rectifying Equipment			56.0	79.3	41.6	15.8
Resistors			61.2	101.8	66.3	33.0
Insulated Electrical Conductors With Fittings			35.7	50.8	42.3	15.3
Electric Motors Under 1/40 Horsepower	9,363,576 no	13,672,910 no	70.1	92.6	32.1	60.9
Gasoline Engine Generators Not Over 5 Kilowatts	115,686 no	125,613 no	29.6	38.2	29.1	99.5
Welding Equipment and Parts			47.4	69.3	46.2	39.1
Batteries and Parts (excl. lead-acid batteries)			78.2	103.0	31.7	44.0
Permanent Magnets and Magnetic Workholders			45.0	59.9	33.1	50.2
Electric Signalling Apparatus and Parts			78.6	137.8	75.3	30.5
Transport Equipment			232.6	368.3	58.3	8.5
Civilian Aircraft			23.2	33.2	43.1	2.2
Aircraft Parts			138.6	120.6	-13.0	5.0
Self-Propelled Rail Vehicles	13 no	232 no	7.8	150.3	1,826.9	93.4
Parts for Rolling Stock			36.1	36.1	0.0	20.0
Automotive Products			14,919.3	18,476.9	23.9	34.5
Passenger Cars	1,791,164 no	1,950,406 no	10,293.5	12,349.9	20.0	42.2
Assembled Trucks	420,212 no	566,283 no	1,715.9	2,349.3	36.9	38.9
Automotive Parts, Accessories and Engines			2,061.3	3,205.6	55.5	20.0
Body Stampings			78.5	119.5	52.2	45.9
Bumpers			20.7	32.3	56.0	14.3
Wheels			17.0	32.3	90.0	11.0
Brakes and Parts			35.7	55.9	56.6	10.2
Transmissions			124.6	155.2	24.6	14.4
Engines and Parts			383.9	617.7	60.9	16.7
Engines			257.5	461.5	79.2	15.9
Parts			126.4	156.2	23.6	19.7
Starting and Ignition Equipment			89.8	134.2	49.4	40.3
Starting Motors			26.2	37.3	42.4	51.1
Ignition Wiring Sets			11.3	25.9	129.2	5.6
Pumps			28.0	50.1	78.9	23.8
Electric Lighting Equipment			35.0	41.0	17.1	36.4
Radios	673,265 no	883,457 no	29.6	45.6	54.1	12.4
Furniture			21.6	42.5	96.8	8.0
Snowmobiles	20,572 no	26,619 no	32.4	39.0	20.4	53.3
Golf Carts, Mopeds and Similar Vehicles	509,577 no	548,410 no	799.6	478.6	-40.1	93.7

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Consumer Goods			$8,296.4	$11,265.6	35.8%	18.8%
Color Video Cassette Recorders	4,797,373 no	9,306,563 no	1,615.2	2,838.1	75.7	98.7
Video Tape Players	99,176 no	144,631 no	47.0	69.5	47.9	93.2
Assembled Color Television Receivers	912,636 no	1,405,422 no	222.9	350.0	57.0	35.0
Assembled Black and White Television Receivers	339,121 no	672,945 no	32.2	62.6	94.4	21.6
Television Combinations			16.3	29.3	79.8	15.5
Unassembled Television Receivers and Incomplete Subassemblies			167.9	271.6	61.8	30.5
Television Picture Tubes and Parts			62.9	89.5	42.3	57.6
Parts for Television Receivers			473.8	656.1	38.5	42.2
Converters, Preamplifiers, Amplifiers and Couplings for Cable Television			185.5	247.4	33.4	48.4
AM and AM/FM Radio Receivers (except for motor vehicles)	4,467,800 no	4,427,759 no	216.6	239.9	10.8	36.6
Radio-Tape Recorder Combinations	3,654,031 no	5,072,540 no	229.5	286.4	24.8	41.5
Radio-Tape Player Combinations	7,620,248 no	10,132,064 no	418.3	574.3	37.3	55.9
Radio-Phonograph-Tape Recorder Combinations	466,800 no	614,032 no	44.5	69.7	56.6	52.2
Audio Tape Players	5,528,437 no	5,541,892 no	123.6	124.2	0.5	67.7
Audio Tape Recorders and Dictation Machines and Parts	6,487,975 no	7,355,194 no	478.6	570.1	19.1	67.5
Tape Recorder and Tape Player Combinations (not incorporating radio or television receiver)			10.9	56.3	416.5	23.0
Record Players, Phonographs, Record Changers and Turntables and Parts	2,839,447 no	2,836,044 no	153.8	213.9	39.1	80.4
Electric Appliances and Parts			443.0	641.7	44.9	34.3
Refrigerators and Parts			26.3	53.5	103.4	23.8
Microwave Ovens	1,025,491 no	1,731,868 no	185.3	264.9	43.0	49.9
Electric Stoves and Ranges and Parts			125.4	195.1	55.6	90.1
Home Sewing Machines	183,999 no	253,961 no	20.8	31.1	49.5	19.2
Kerosene Heaters	1,920,191 no	837,560 no	105.6	39.6	-62.5	55.3
Lawn Mowers and Parts			23.3	33.6	44.2	43.3
Portable Typewriters	761,885 no	1,138,201 no	67.4	99.3	47.3	55.0
Earthen and China Tableware and Household Articles			323.5	367.9	13.7	40.0
Nonbone China Tableware	153,987,792 pc	173,427,516 pc	127.7	149.3	16.9	41.1
Earthen Tableware	255,261,168 pc	268,660,860 pc	143.1	156.7	9.5	56.4
Table Flatware and Kitchen Knives			94.0	115.5	22.9	44.1
Metal Housewares			51.6	52.5	1.7	10.5
Pipe Wrenches and Spanners and Parts			25.8	26.3	1.9	19.0
Variable Focus Still Cameras	4,202,325 no	5,219,265 no	422.2	528.4	25.2	86.6
Mounted Photographic Lenses	5,270,432 no	7,947,964 no	153.8	174.6	13.5	76.8
Flash Apparatus			50.2	52.3	4.2	64.8
Still Photographic Color Film (35 mm)	21,665,431 no	33,559,006 no	26.5	43.9	65.7	65.2
Optical Elements			58.3	92.6	58.8	35.5
Glasses and Frames			51.5	58.7	14.0	12.6
Clocks and Watches and Parts			335.3	435.6	29.9	34.5
Solid State Electronic Watches	6,188,931 no	6,570,353 no	51.2	53.3	4.1	25.5
Other Watches Without a Balance Wheel and Hairspring	6,171,875 no	9,660,652 no	171.1	249.6	45.9	48.7
Electric Clocks (incl. battery operated)	2,885,289 no	3,470,598 no	26.8	31.2	16.4	46.3
Toys and Sporting Goods			274.8	412.2	50.0	12.6
Video Games and Parts			86.5	95.0	9.8	45.4
Firearms and Parts			34.5	46.2	33.9	30.3
Fishing Equipment			53.0	67.6	27.5	34.2
Toys			35.7	112.1	214.0	9.4

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Musical Instruments and Parts			$145.2	$196.6	35.4%	49.5%
Pianos and Parts	22,500 no	31,186 no	37.3	49.2	31.9	53.6
Electronic Musical Instruments			64.5	91.5	41.9	81.2
Motorcycles and Parts (excl. engines)			741.0	661.5	-10.7	90.6
Motorcycles	511,519 no	411,997 no	625.2	447.2	-28.5	90.3
Motorcycles With Piston Displacement Over 290 cc	288,317 no	187,826 no	495.3	322.4	-34.9	91.6
Parts (excl. engines)			115.9	214.3	84.9	91.2
Adult Bicycles and Parts			131.8	140.2	6.4	40.4
Bicycles	475,263 no	539,494 no	53.6	67.0	25.0	31.9
Parts			78.2	73.2	-6.4	53.5
Outboard Motors	79,040 no	100,692 no	41.3	71.4	72.9	70.4
Clothing and Accessories			339.7	494.0	45.4	3.7
Women's and Girls' Cotton Jackets	2,647,800 no	2,638,776 no	34.8	35.2	1.1	16.0
Women's Cotton Slacks	8,177,088 no	10,103,280 no	53.8	69.5	29.2	11.9
Women's and Girls' Cotton and Manmade-Fiber Knit Shirts	9,640,464 no	10,044,264 no	30.0	30.5	1.7	5.0
Men's and Boys' Cotton Knit Shirts	5,501,088 no	7,372,776 no	24.0	35.8	49.2	8.7
Footwear			22.1	26.4	19.5	0.5
Furniture			33.8	44.6	32.0	2.2
Pearls (not set or strung)			150.1	215.2	43.4	88.4
Jewelry			39.7	60.0	51.1	3.8
Works of Art			32.4	45.4	40.1	5.0
Printed Material			98.5	133.5	35.5	13.6
Pens and Pencils			74.1	96.8	30.6	60.5
Pharmaceuticals			138.5	138.4	-0.1	9.0
Bulk Vitamins			67.5	43.1	-36.1	30.6
Benzenoid Drugs			54.6	59.0	8.1	9.7
Intermediate Goods						
Steel Mill Products			5,391.3	7,275.6	35.0	5.9
Wire Rods and Bars	4,236,915 stn	6,630,005 stn	2,117.4	3,149.9	48.8	30.9
Unalloyed Wire Rods	864,535 stn	1,319,378 stn	337.8	495.1	46.6	26.5
Semifinished Angles, Shapes and Sections Over 3"	189,625 stn	282,183 stn	69.0	107.3	55.5	25.1
Plates and Sheets	457,211 stn	711,502 stn	142.2	215.7	51.7	35.6
Tin Plate and Tin-Coated Sheets	2,364,270 stn	3,315,994 stn	1,012.8	1,597.8	57.8	35.0
Coated Plates and Sheets	164,310 stn	211,071 stn	96.6	120.7	24.9	60.8
Unalloyed Non-Pickled Plates and Pickled Sheets	1,081,226 stn	1,683,098 stn	492.0	817.9	66.2	57.8
Unalloyed Hot-Rolled Sheets	223,869 stn	285,145 stn	64.1	95.2	48.5	12.8
Unalloyed Cold-Rolled Sheets	145,777 stn	190,816 stn	44.9	62.5	39.2	12.9
Strip	558,960 stn	830,497 stn	203.4	329.5	62.0	26.5
Rails	40,331 stn	65,720 stn	39.9	71.0	77.9	31.3
Wire	87,213 stn	193,868 stn	34.0	69.2	103.5	61.1
Unalloyed and Uncoated Wire	131,255 stn	184,694 stn	83.8	121.4	44.9	28.2
Tubes, Pipes and Fittings	105,111 stn	137,235 stn	55.8	76.4	36.9	39.9
Cast Fittings, Forged Steel Flanges and Butt-Weld Fittings	745,045 stn	1,405,798 stn	420.8	788.4	87.4	29.9
Unalloyed Welded or Seamless API Line Pipe	22,755 stn	37,238 stn	31.3	52.4	67.4	41.1
Unalloyed Welded or Seamless Pipes and Tubes, Not Threaded	105,234 stn	238,058 stn	38.6	91.2	136.3	30.9
Unalloyed Welded or Seamless Pipes and Tubes, Threaded	158,471 stn	269,188 stn	55.7	101.7	82.6	22.5
	102,607 stn	258,045 stn	63.3	157.3	148.5	57.6

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Unalloyed Pipes and Tubes of Circular Cross Section	100,632 stn	173,439 stn	$ 48.0	$ 90.4	88.3%	36.8%
Alloyed Pipes and Tubes	32,991 stn	50,899 stn	52.2	60.8	16.5	32.4
Nonferrous Metals			393.3	506.4	28.8	6.2
Copper and Copper Alloys			107.1	114.0	6.4	7.5
Pipes and Tubes			50.7	58.3	15.0	36.8
Aluminum and Aluminum Alloys			222.7	331.1	48.7	13.5
Wrought Aluminum Sheets and Strip, Not Clad	113,223 stn	142,521 stn	211.1	302.9	43.5	39.0
Titanium	2,698 stn	5,256 stn	20.7	34.6	67.1	71.0
Refined Gold Bullion	73,841 toz	0 toz	32.5	0.0	-100.0	0.0
Steel Pillars, Girders and Similar Structural Units			23.9	36.9	54.4	29.2
Wire Products (excl. insulated electric wire)			95.2	122.6	28.8	24.8
Steel Wire Strand, Unfitted and Uncovered	47,847 stn	44,404 stn	40.4	45.8	13.4	32.6
Nails and Industrial Fasteners			293.4	438.2	49.4	38.9
Steel Bolts and Bolts With Nuts	46,833 stn	62,571 stn	35.9	55.4	54.3	42.1
Steel Nuts	47,188 stn	61,801 stn	62.2	90.9	46.1	51.3
Steel Screws	132,440 stn	181,519 stn	134.7	209.1	55.2	60.9
Steel Chains and Parts			51.2	61.9	20.9	49.2
Industrial Chemicals (excl. fertilizers and pharmaceuticals)			849.4	1,047.2	23.3	16.7
Organic Chemicals Found Naturally in Coal Tars			17.8	26.0	46.1	5.3
Other Cyclic Organic Chemical Products			135.0	151.3	12.1	20.4
Flavors and Other Aromatic Compounds			32.5	40.3	24.0	42.6
Organic Acids, Acid Anhydrides and Salts			27.8	34.9	25.3	14.0
Amino Acids and Other Nitrogenous Compounds			101.5	127.1	25.2	18.8
Synthetic Organic Dyestuffs			83.1	103.1	24.1	30.8
Plastic Materials and Resins			243.6	321.4	31.9	21.7
Polystyrene Resins and Styrene Copolymers and Terpolymers			47.7	52.2	9.4	44.7
Flexible Film, Strips and Sheets of Plastic Materials			97.8	125.0	27.8	23.7
Synthetic Rubber			22.9	28.3	23.6	9.5
Rubber or Plastic Hose, Pipe and Tubing			16.0	26.5	65.6	16.5
Rubber or Plastic Gaskets			16.6	28.3	70.5	20.9
Tires and Tubes			409.1	516.3	26.2	28.1
Car Tires	4,482,110 no	6,433,383 no	127.1	171.5	34.9	20.6
Truck and Bus Tires	1,777,781 no	2,091,858 no	215.9	254.5	17.9	37.0
Plywood and Veneers	122,683 msf	119,315 msf	42.5	42.8	0.7	6.9
Paper and Paper Products			63.7	79.2	24.3	1.5
Yarns, Fabrics and Made-Up Textile Articles			581.7	671.0	15.4	14.8
Manmade-Fiber Yarn	12,014 stn	13,814 stn	48.0	56.1	16.9	17.7
Cotton Fabrics	50,007,199 syd	79,031,384 syd	65.7	111.0	68.9	12.6
Manmade-Fiber Fabrics	274,780,650 syd	229,130,365 syd	278.6	260.4	-6.5	37.1
Bleached or Colored Fabrics of Continuous Polyester Fibers	197,166,684 syd	156,103,547 syd	199.1	173.8	-12.7	58.4
Wool Fabrics	4,490,131 syd	6,804,987 syd	18.9	30.4	60.8	16.5
Wadding, Batting and Nonwoven Fabrics	939 stn	1,463 stn	38.4	44.7	16.4	55.2
Ceramic Tile	51,545,517 sft	67,595,951 sft	39.9	56.4	41.4	22.6
Electrodes for Electric Furnaces or Electrolytic Use	23,113 stn	37,724 stn	43.7	64.1	46.7	64.9
Coke for Use as Fuel	0 stn	354,308 stn	0.0	29.7	100.0	63.0
Photographic Film and Paper (excl. film packaged for retail sale)			262.5	293.1	11.7	41.0
Medical X-Ray Film	100,746,787 sft	110,129,217 sft	70.7	67.8	-4.1	44.2
Silver Halide Color Photographic Paper	479,713,395 sft	443,728,422 sft	109.1	103.8	-4.9	52.6

Commodity	Quantity 1983	Quantity 1984	Value 1983	Value 1984	Percent Change 1983/84	Japan's Share of U.S. Imports 1984
Food and Feed			$365.2	$443.9	21.6%	2.1%
Fish and Fish Products			218.5	244.6	11.9	6.7
Fresh, Chilled or Frozen Tuna	53,146 stn	58,937 stn	52.3	70.0	33.8	32.4
Scallops	3,713 stn	3,600 stn	33.1	31.9	-3.6	27.1
Alcoholic Beverages			19.9	25.6	28.6	0.9
Miscellaneous Imports			315.2	383.4	21.6	5.0

Key to quantity abbreviations:

msf = thousand square feet
no = number
pc = pieces
sft = square feet
stn = short tons
syd = square yards
toz = troy ounces

*Imports are valued on a Customs value basis.

Source: U.S. Department of Commerce, U.S. General Imports: Schedule A Commodity by Country (FT 135), December 1983 and December 1984